



Rhode Island Commerce Corporation

RFP: Consultant to Prepare 2014 Rhode Island Clean Energy Industry Report

REF No. 2014-IndustryReport

Release Date: December 17, 2014

Applications Due: January 15, 2015

Commerce RI  
315 Iron Horse Way  
Suite 101  
Providence, RI 02908  
[ref@commerceri.com](mailto:ref@commerceri.com)

## Summary

The Rhode Island Commerce Corporation (“Commerce RI”) , in partnership with the RI Office of Energy Resources (“OER”), is requesting proposals from consultants with significant expertise in conducting surveys and analyzing survey results to research and prepare the first Rhode Island Clean Energy Industry Report (the “Industry Report”). The selected consultant will work closely with Commerce RI and OER to conduct primary and secondary market research and analysis and ultimately write a report that effectively communicates the status of Rhode Island’s emerging clean energy market. The report will tentatively be due on April 30, 2015. Commerce RI seeks a contractor with demonstrated experience in researching and writing clean energy industry reports or similar industry segment reports, particularly in the New England states. The contractor should demonstrate excellent research and written communication skills, and effective research project management abilities.

## Background and Goals

Commerce RI is the official economic development organization for the State of Rhode Island. Commerce RI manages the State’s Renewable Energy Fund (REF) which provides grants and loans for renewable energy projects with the potential to make electricity in a cleaner, more sustainable manner, while stimulating job growth in the green technology and energy sectors of Rhode Island's economy.

The Rhode Island Office of Energy Resources is the lead state agency on energy policy and programs. OER’s mission is to lead Rhode Island to a secure, cost-effective, and sustainable energy future. OER works closely with private and public stakeholders to increase the reliability and security of our energy supply, reduce energy costs and mitigate against price volatility, and improve environmental quality.

Both agencies will be providing funding for this project. The total amount of funding available through this Request for Proposal is up to \$40,000 for a one year term. There will be an option at the end of the contract term to extend this contract for two (2) additional years. This solicitation is intended to yield one (1) well-researched report that describe and evaluate the status of Rhode Island’s clean energy sector by presenting select metrics related to the clean energy industry. The clean energy industry includes firms engaged in whole or in part in providing goods and/or services related to renewable energy, energy efficiency, non-fossil fuel transportation, and carbon management related to energy.

The goals of this report include an analysis of:

## REF No. 2014-IndustryReport

- ❖ The size and breadth of the clean energy industry
- ❖ The needs of employers regarding education and training
- ❖ The opinions and priorities of industry executives regarding Rhode Island business and capital climate

The Industry Report will play a critical role in educating stakeholders regarding the growth and depth of the industry as well as the challenge that the industry faces. The report will also provide REF and OER with an indication of how its programs can be designed and optimized to support continued growth and to address industry challenges.

### Eligible Applicants and Minimum Qualifications

Through this Request for Proposals (“RFP”), Commerce RI and OER seek to engage one (1) consultant with significant experience in conducting surveys and analyzing survey data. At a minimum, the successful applicant to this RFP must:

- ❖ Demonstrate the ability to accurately survey the clean energy industry, including but not limited to the ability to identify the survey target group, draw up survey instruments, and capture survey data online, by telephone, through in-depth interviews and in person, if necessary.
- ❖ Demonstrate a strong track record in analyzing both quantitative and qualitative data, including but not limited to assuring the quality of the data, statistical analysis including statistical inference, and putting data in the context of Rhode Island, U.S., and global economy trends.
- ❖ Experience working with multiple industry, government and academic stakeholders.
- ❖ Demonstrate a track record of preparing reports of this kind and ability to write clearly and present statistical data in a way that is understandable to the public.
- ❖ Ability to collect data and prepare reports on time and on budget.
- ❖ Submit a proposal to this RFP that meets all of the proposal requirements outlined below.

Eligible applicants include individuals, sole proprietors, professional consultants, institutions or companies with multiple employees. Two or more entities are permitted to apply as an applicant team.

Estimated Timeline of RFP Process:

Release of RFP	Wednesday, December 17, 2014
Questions Due	Monday, January 5, 2015
Q & A Posted	Thursday, January 8, 2015
Proposals Due	Thursday, January 15, 2015

Interviews of top three applicants	Tuesday, January 20, 2015
January Commerce Rhode Island Board Meeting	Monday, January 26, 2015
Final notification and contracting with selected applicant	Tuesday, January 27, 2015
Preparation for 2015 survey begins	Early Quarter 1, 2015
2015 Clean Energy Industry Report	Tentative date: Thursday, April 30, 2015

## Performance and Contract Specifications

### Scope of Work

The scope of work below is intended to allow applicants to prepare a Proposal that demonstrates their ability to carry out the typical tasks required and to provide an anticipated budget for work for the Industry Report. Applications should demonstrate their ability to do the following:

#### Task 1 – Rhode Island Clean Energy Survey and Analysis

- ❖ Create a database of companies to survey using the database of known clean energy employers (data sets to be provided by Commerce RI and OER, as well as potentially National Grid) and potential clean energy employers (identified through North American Industry Classification System (NAICS) codes in a database to be purchased by the Consultant) to ensure representation by various employment characteristics, such as employer size, sector, geographic area and other recommended key characteristics.
- ❖ Create (in conjunction with Commerce RI and OER) a list of survey questions.
- ❖ Develop comprehensive survey instruments with balanced and unbiased survey questions to gather relevant data on the number, size, and growth of clean energy firms in Rhode Island, and clean energy firm's workforce needs ("Annual Industry Overview"). Data points will likely include but not be limited to:

- a. Number of clean energy firms in Rhode Island
- b. Number of clean energy workers in Rhode Island
- c. Clean energy workers by region
- d. Company size by number of employees
- e. Clean energy firms and employment by primary activity
- f. Clean energy firms and employment by clean energy focus
- g. Renewable energy employees by technology focus
- h. Number of employees working in a new clean energy position
- i. Profiles of new hires in Rhode Island clean energy firms

## REF No. 2014-IndustryReport

- j. Hiring methods used by clean energy firms
- k. Difficulty for clean energy firms in hiring
- l. Demographics of the clean energy workforce, including men, women and racial or ethnic minorities

- ❖ Data Collection and Review
- ❖ Quality control plan for data collection which should include a plan to ensure adequate response rates and completeness among identified firms. The quality control plan should include ways to ensure that neighboring state (MA and CT) data is excluded from the analysis.
- ❖ Data Analysis, comparison and findings

### Task 2 – Rhode Island Clean Energy Industry Data Summary Report

- ❖ Using the information from Task 1, the consultant will work with REF and OER staff to draft a summary report of the data and findings. This should include narrative and analysis of the results of the survey as well as final conclusions and recommendations.
- ❖ Draft a narrative describing the status of Rhode Island's clean energy industry
- ❖ Work with project team to finalize the summary report

### Task 3 – Presentation of Clean Energy Industry Report

- ❖ Draft a slide deck of approximately 20-30 slides summarizing the findings of the Industry Report
- ❖ Provide at least three (3) presentations on one hour in length on the Industry Report
- ❖ Be available for questions (from reporters, legislators, stakeholders, or others) on the Industry Report methods as required.

## Budget Requirements

Consultant must provide an anticipated budget with the Proposal broken down by task. Commerce RI and OER have allocated a budget of up to \$40,000 for a one (1) year contract with the possible option of a two (2) year extension. Budget evaluation will be a factor in the selection criteria. Please note that the Consultant will be paid on a reimbursement basis based on a deliverable schedule and for the time spent on conducting analysis and writing the Industry Report. Consultant may be reimbursed for any Commerce RI-approved purchases of datasets for the use of preparing the Industry Report. Applicants should include both staff time and expected expenses, including but not limited to, any use of third parties, expected purchases of datasets or costs of mailings when creating the budget for the Proposed Work Plan.

## Anticipated Timeline of Contract

A final contract is subject to successful negotiation of a final budget and scope of services. Commerce RI's selection of a Consultant pursuant to this RFP does not mean that Commerce RI accepts all aspects of the proposal, modifications to which may be requested and agreed to during contract negotiations. It is anticipated that the contract will commence in January and will continue for a period of twelve months (12). The contract will be reviewed during its course and may be extended at the sole discretion of Commerce RI.

## Proposal Requirements

It is strongly preferred that the Executive Summary, Statement of Qualifications and Proposed Work Plan together are no longer than twelve (12) pages in length, single spaced, with font no small than 12 points. Information required for the Proposal includes the following:

Executive Summary: Applicants should provide a summary of their organization, their qualifications and their proposed approach for working with Commerce RI and OER.

Statement of Qualifications: All responses must include a statement of qualifications, experience and description of the applicant firm or individual and its/their history. The response should specifically indicate the applicant's current and historical expertise in providing the services identified in the RFP.

Proposed Work Plan & Budget: Using the Scope of Work provided above, submit a proposed work plan (the "Proposed Work Plan") including the proposed method, timeline and budget per item. Budgets should show staff time and other expenses as separate line items, preferably in Excel format.

Staff Qualifications (One page per staff member): All responses must include resumes of each individual who will be providing Consulting Services under this RFP, as well as written descriptions of the individual's experience with the specified eligibility criteria. Commerce RI reserves the right to research and review the background of any or all personnel assigned to work under agreement for services and, based on such research, to reject the use of any persons within Commerce RI's discretion. Any changes to personnel require formal written approval by Commerce RI and Commerce RI reserves the right to terminate agreement for services if changes are not approved.

Writing Sample: It is recommended that applicants attach a writing sample to their Proposal, preferably a report that is similar to the Industry Report. The Writing Sample is not part of the twelve (12) page limit requirement. It should be included as an appendix or attachment to the proposal.

## REF No. 2014-IndustryReport

References (One Page): All responses must include references from at least 3 clients of the firm, and preferably clients who have utilized the firm on matters related to the services identified in this RFP. The references must include a contact person, a full address, and a phone number. In addition to the foregoing, all responses must include a listing of public and private clients for whom the firm has provided services similar to those set forth in this RFP, with a description of the services provided.

Rate sheet submission (One Page): Please include the rates and titles of all team members working on this project.

Applicants must also include the following attachments:

- ❖ Proposal Cover Sheet
- ❖ Attachment A: Authorized Applicant's Signature and Acceptance Form

It is the sole responsibility of the applicant to ensure that its Proposal is complete and properly submitted. At its discretion, Commerce RI may request supplemental materials from the applicant and such materials must be submitted within five (5) days of the request or the Proposal may be rejected without further review.

Four (4) copies of the completed proposal must be submitted to Commerce RI **by 4:00pm EST on January 15, 2015 to:**

Rhode Island Commerce Corporation  
Attn: RI Clean Energy Industry Report RFP  
315 Iron Horse Way, Suite 101  
Providence, RI 02908

One copy of the proposal must be delivered via electronic format, including a scanned Signature and Acceptance form (Attachment A), either by email to [ref@commerceri.com](mailto:ref@commerceri.com) or included on a CD or flash drive. No late submissions will be accepted. All email submissions should include "RI Clean Energy Industry Report RFP" in the subject line.

### Selection and Evaluation Criteria

All proposals must meet the Program objectives and must be responsive to the relevant Scope of Work and proposal requirements outlined above. Proposals will be evaluated on the general criteria below:

Criteria	Sub-Criteria
<b>Minimum Threshold</b>	<p>Commerce RI reserves the right to only consider Proposals that, in its sole judgment, meet the following minimum threshold criteria including:</p> <ul style="list-style-type: none"> <li>• The Applicant is eligible for selection (See the Eligible Applicants &amp; Minimum Qualifications section of this the RFP).</li> <li>• The Proposal is complete and responsive to the Proposal Requirements and all other requirements of this RFP.</li> <li>• The Proposal includes all required attachments.</li> <li>• The clarity, specificity, and consistency of the Proposal are sufficient to be deemed credible.</li> <li>• Applicant is in good standing with any other contracts with Commerce RI, OER, and the State of RI.</li> </ul>
<b>Range of Services to be Provided</b>	<ul style="list-style-type: none"> <li>• Does the applicant plan to provide services commensurate with the services requested by Commerce RI in this RFP?</li> </ul>
<b>Experience and Qualifications</b>	<ul style="list-style-type: none"> <li>• Does the applicant have documented experience in providing the services requested, including: <ul style="list-style-type: none"> <li>○ A track record in conducting surveys</li> <li>○ A track record in analyzing both quantitative and qualitative data;</li> <li>○ A track record in writing clear and easily understandable reports.</li> <li>○ A track record for achieving milestones and deliverables on schedule and on budget</li> </ul> </li> <li>• What is the quality of the applicant's performance on similar past consulting assignments or their achievements related to proposed work? How were their efforts evaluated?</li> </ul>



## REF No. 2014-IndustryReport

<b>Overall Quality of Proposal</b>	<ul style="list-style-type: none"><li>• Does the applicant demonstrate an understanding of the concepts and motivators underlying the Industry Report?</li><li>• Has the applicant presented their qualifications clearly?</li><li>• Is the applicant's proposal cost-competitive?</li><li>• Has the applicant demonstrated sufficient time resources and flexibility to provide the Industry Report to the schedule required?</li></ul>
------------------------------------	--

### Proposal Review Process and Interviews

Proposals will be initially reviewed by Commerce RI and OER to determine whether each is complete and meets basic eligibility requirements. Proposals deemed eligible will undergo a merit review process managed by Commerce RI. Both Commerce RI and OER will provide scoring of equal weight to all proposals. They will be judged on a competitive basis against other Proposals based on the Selection Criteria. The top three (3) ranking Proposals will be invited to interview. It is anticipated that Interviews will occur on January 20, 2015. After completion of interviews, Commerce RI will select their first choice. Commerce RI will then move forward to contract with the selected applicant.

### Questions and Contact Information

Please submit all questions via email to [ref@commerceri.com](mailto:ref@commerceri.com). "Clean Energy Industry Report RFP" should appear in the subject line. All questions need to be submitted no later than 4:30pm on January 5, 2015. Responses to the questions concerning this RFP will be posted online at [www.commerceri.com](http://www.commerceri.com) and [www.purchasing.ri.gov](http://www.purchasing.ri.gov) on January 8, 2015 to ensure equal awareness of important facts and details.

### About Commerce RI

Commerce RI's mission is to work with public, private and non-profit partners to create the conditions for businesses in all sectors to thrive and to improve the quality of life for our citizens by promoting the State's long-term economic health and prosperity. The Rhode Island Commerce Corporation's Renewable Energy Fund (REF) is dedicated to increasing the role of renewable energy throughout the state. The REF provides grants and loans for renewable energy projects with the potential to create electricity in a cleaner, more sustainable manner, while stimulating job growth in the green technology and energy sectors of Rhode Island's economy. Using funds from the 'system benefit charge' on electric bills and Alternative

## REF No. 2014-IndustryReport

Compliance Payments, Commerce RI helps offset the cost of renewable projects for businesses and homeowners.

### About Rhode Island Office of Energy Resources

The Office of Energy Resources works closely with private and public stakeholders to increase the reliability and security of our energy supply, reduce energy costs and mitigate against price volatility, and improve environmental quality. Rhode Islanders spend over \$3 billion per year on energy to light their homes, keep the heat on, and fuel their vehicles. Fossil fuels such as natural gas, fuel oil, and gasoline supply the vast majority of these energy needs. By recommending and implementing smart energy policies-such as those that promote energy efficiency and renewable energy-the OER helps reduce Rhode Island's dependence on these out-of-state fuels, advancing our State as a national leader in the new clean energy economy.

### Disclaimer

This RFP does not commit Commerce RI to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. Commerce RI reserves the right to accept or reject any or all applications received, negotiate with all qualified applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in its best interests.

This RFP has been distributed electronically using Commerce RI's website. It is the responsibility of applicants to check the website for any addenda or modifications to a RFP to which they intend to respond. Commerce RI accept no liability and will provide no accommodation to applicants who submit an application based on an out-of-date RFP document.

### Proposal Checklist

- ☐ Proposal Cover Sheet
- ☐ Proposal
- ☐ Proposal Budget in Excel format
- ☐ Attachment A: Authorized Applicant's Signature and Acceptance Form

It is the sole responsibility of the Applicant to ensure that its Proposal is complete and properly submitted. At its discretion, Commerce RI may request supplemental materials from the Applicant and such materials must be submitted within five (5) days of the request or the Proposal may be rejected without further review.

One copy of the proposal must be delivered via electronic format, including a scanned Signature and Acceptance form (Attachment A), either by email to [ref@commerceri.com](mailto:ref@commerceri.com) or included on a CD or flash drive with four hard copy submissions of all proposal materials. **All applications are due to Commerce RI by 4:00pm EST on January 15, 2014.** No late submissions will be accepted. All email submissions should include "RI Clean Energy Industry Report" in the subject line.

**Proposal Cover Sheet**

<b>Lead Organization Name (as shown on your income tax return)</b>
<b>Lead Organization Business Name, if different than above</b>
<b>Lead Organization Address (number, street, apt. or suite no., city, state and ZIP)</b>
<b>Lead Organization Main Contact/s for the purpose of this Proposal (name, title, phone and email. Include address if different than above)</b>
<b>Partner/s Organization Name &amp; Address (if applicable)</b>

Attachment A: Authorized Applicant's Signature and Acceptance Form

The undersigned is a duly authorized representative of the applicant listed below. The applicant has read and understands the RFP requirements. The undersigned acknowledges that all of the terms and conditions of the RFP are mandatory.

The applicant understands that all materials submitted as part of the application are subject to disclosure under the Rhode Island Public Records Law, and acknowledges and agrees that Commerce RI has no obligation, and retains the sole discretion to fund or choose not to fund the application set forth herein, and that Commerce RI's receipt of the application does not imply any promise of funding at any time.

The applicant understands that, if selected by Commerce RI pursuant to this RFP, the applicant will detail and execute a contract that outlines the respective roles and responsibilities of the parties.

I certify that the statements made in this application, including all attachments and exhibits, are true and correct to the best of my knowledge.

Lead Applicant: \_\_\_\_\_  
(Printed Name of Applicant)

By: \_\_\_\_\_  
(Signature of Applicant or Authorized Representative)

Title: \_\_\_\_\_

Date: \_\_\_\_\_